



PRIZM
CRYSTAL CLEAR INSURANCE

Virtual Assistants Insurance Proposal

Simply complete and sign the form below, answering all the questions. You can complete this form on-screen and email it to us at office@prizmsolutions.co.uk - simply click the cursor to the right of the arrow below then use the "TAB" key to move through the form. Alternatively, you can print it out send it to us at:

Prizm Solutions Limited, 21A Albert Road, Tamworth, Staffordshire, B79 7JS

Telephone: 01827 313931

Fax: 01827 313931

We'll get back to you as soon as we can to confirm that you're covered.

Trading Name:		Date Established:
Address:		
		Postcode:
Tel:	Fax:	
www.	Email:	

Please provide full details of each partner/principal/director

Name	Qualifications	Year qualified	Years trading

Of which professional organizations or trade associations are you or your business a member?

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The core package of cover is subject to your turnover not exceeding £50,000 per annum. If your turnover exceeds this amount please state:

£

Turnover inc. fees:	UK	Other EU	USA/Canada	Other
Estimate for current year	£	£	£	£

Please advise if you are involved in any of the following activities and %age of your turnover each represents (estimated if a new business)

The following are Included within the standard rates quoted

1. Secretarial & General Administration Duties	%
2. Telephone & General Reception Duties	%
3. Graphic Design (excl Print Services)	%
4. Copywriters	%
5. Desktop Publishing (excl Print Services)	%
6. Telemarketing	%
7. Event Coordination (not Management)	%
8. Market Research	%
9. PR Consultants	%
10. Marketing Programme Management	%
11. Bookkeeping	%
12. Data processing & Database Management	%
13. Webmaster and Website Maintenance	%
14. Website Design (not Business Critical)	%
15. Domain Name Registration Services	%
16. Search Engine Optimisation	%
17. Transcription Services (not Legal/Medical)	%
18. Translation – Into mother tongue only (not Legal/Medical)	%

The following represent a higher risk and require referral to underwriters

1. Contract & Tender Management	%
3. Direct Marketing – Email	%
3. Direct Marketing – Post	%
4. Other Editorial Services	%
5. Event Management (excl supply of contractors)	%
6. Print Buying & Management	%
7. Proofreading	%
8. Debt Collection (Clerical to point of issuance of proceedings)	%
9. Payroll	%
10. Website Design (Business Critical)	%
11. Transcription Services – Legal	%
12. Transcription Services – Medical	%
13. Translation – Into mother tongue only – Legal	%
14. Translation – Into mother tongue only – Medical	%
15. Legal Secretarial Services	%
16. Medical Secretarial Services	%
17. Other – Please describe fully	%

I/We Confirm that have I/We have at least 5 years experience in all areas of activity to which I/We have attributed a %'age of our income above.

YES NO

If you use Subcontractors, what %'age of your income is paid to them?			%
Would they be required by contract to carry their own PI?	YES <input type="checkbox"/>	NO <input type="checkbox"/>	

Do you always use your own standard contract terms or terms of business?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
If 'No', do you always have contract terms reviewed by a legally qualified person?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
If 'No', do you always obtain confirmation of contracts in writing	YES <input type="checkbox"/>	NO <input type="checkbox"/>
<i>If 'No', We reserve the right to avoid a claim if we have been prejudiced by the lack of a written contract.</i>		

Has any claim or loss, whether successful or not, ever occurred or been made against you or your predecessors in business, or any past or present partner, principal, director or employee in respect of any of the risks to be insured (whether previously insured or not)?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
Have you ever had any insurance or proposal cancelled, withdrawn, declined or made subject to special terms?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
If YES, please provide full details on a separate sheet		

Has your business been free of legal disputes and/or litigation in the last 3 years?	YES <input type="checkbox"/>	NO <input type="checkbox"/>
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MATERIAL INFORMATION

Please provide us with any information which may be relevant to our consideration of your proposal for insurance. If you have doubt over whether something is relevant, please let us have details.

DATA PROTECTION ACT

By signing this Proposal Form you consent to Prizm Solutions Limited using the information we may hold about you for the purpose of providing insurance and handling claims, if any, and to process sensitive personal data about you where this is necessary (for example health information or criminal convictions). This may mean we have to give some details to third parties involved in providing insurance cover. These may include insurance carriers, third-party claims adjusters, fraud detection and prevention services, reinsurance companies and insurance regulatory authorities. Where such sensitive personal information relates to anyone other than you, you must obtain the explicit consent of the person to whom the information relates both to the disclosure of such information to us and its use by us as set out above. The information provided will be treated in confidence and in compliance with the Data protection Act 1998. You have the right to apply for a copy of your information (for which we may charge a small fee) and to have any inaccuracies corrected.

DECLARATION

I/We declare that to the best of our knowledge and belief, the answers given are true and complete and that all facts and matters which may be relevant to the consideration of our proposal for insurance have been disclosed. I/We understand that this Proposal is for the insurance in the normal terms and conditions of the Insurer's Policy. I/We understand that non-disclosure or misrepresentation of a material fact or matter will entitle the Insurers to avoid the Insurance. I/We agree that this proposal form and all other written information which is provided are incorporated into and form the basis of any contract of insurance.

Signed

Date



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 21A Albert Road,
 Tamworth, Staffordshire, B79 7JS
 Telephone: 01827 313931
 Fax: 01827 313931
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 Financial Services Authority number 459014*



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